

# UWORKS NARRATION GUIDE

## ❖ CTW Referral to Closure Narration Categories:

1. CTW Referral
2. CTW Case Staffing
3. CTW Assessment
  - i. Activate Case Management, Employment Exchange, Assign yourself as Primary or Secondary Counselor, List External Counselor
4. CTW Employment Plan - CTW Primary, CTW Expanded or Follow Up CTW
5. CTW Progress Evaluation
6. CTW Job Development - Narrate each time you contact an employer for your client
7. CTW Obtained Employment
8. CTW Service Closure

Usually done in same day, but separate narrations

narrate, Narrate, **NARRATE!** Minimum every 30 days

## ❖ 1. Referral

- Referral from DWS or VR Counselor
- DWS Counselor refers through UWORKS (Red House Speed Button in UWORKS)
- VR Counselor refers by faxing Partnership Referral Form 360 from USOR website
- CTW Specialist enters VR referral on UWORKS (Red House Speed Button in UWORKS)
- New Customer not known to UWORKS, enter 61 (Seeker Registration)
- Run Pacmis Interface (Search by SSN, Search by Name) and pending results from search: Create or Update HLCI
- **Narrate under “Referral” Category in UWORKS**

## ❖ 2. Case Staffing

- Staff with referring counselor and determine appropriateness (can include client)
- Accept/Decline case within 30 working days
- Email referring Counselor decision and reason
- **Narrate under “Case Staffing” Category in UWORKS**

## ❖ Activate Case Management and Employment Exchange Status:

- Pull up client in UWORKS and from Option Menu, choose: **“Activate/Inactivate Case Management”**, Accept Yes to assign self as Primary Counselor if referral is from VR, Select Secondary Counselor if referral is from DWS
- Add the Referring Counselor information under External Counselor on UWORKS
- **Narrate under same note as 2 “Case Staffing” Category in UWORKS**

## ❖ 3. Assessment:

- Appointment with CTW Specialist and Client (can include referring counselor)
- Get signed Releases, 115 (DWS Form) or 45B (USOR Form) and fax to imaging unit to be imaged under the **“Misc. Tab”**
- View IPE & Eligibility Letter in IRIS or get a copy from VR or view DWS Plan
- Update/Complete Seeker Info, Placement, Education, & Work History Tabs in UWORKS
- **Narrate under “Assessment” Category in UWORKS**

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### ❖ 4. Develop Employment Plan:

- Complete the plan within 30 working days of accepting the case.
- If you are the Primary Counselor you create the plan, if you are Secondary Counselor, DWS completes the plan.
- Justification should cover LMI, Education, Work History, Interest, & Skills (LEWIS)
- Tasks should be SMART (Specific, Measurable, Attainable, Relevant, & Trackable)
- Open Objective: **Intensive Service**
- Open one Service: **CTW Primary** or **CTW Expanded**
  - **CTW Primary** - Open when client needs minimal help finding employment.  
(Note: For DWS Referrals it does not count against the time limit for Job Search)
  - **CTW Expanded** - Open when clients need extended help finding employment.  
(Note: This does count toward 6 Weeks Job Search time limit for DWS FEP cases)
  - **Narrate under “Employment Plan” Category in UWORKS**

### ❖ 5. Progress Evaluation:

- For all monitoring / evaluation activities. Attendance, in agreed upon activities, job logs, job search, interviews, progress reports, relating to the employment goal
- **Narrate under “Progress Evaluation” Category in UWORKS**

### ❖ 6. Job Development:

- **Narrate under “Job Development” Category in UWORKS** each time you contact an employer for your client

### ❖ 7. CTW Obtained Employment:

- Close Choose To Work Primary Assisted Service or Choose to Work Expanded Service on the Plan: **“Obtained Employment”**
- Open Follow Up Choose To Work Objective and Service within 30 days of employment
  - Add job to Work History Tab and Customer Misc. (Add Placement)
  - Add to Monthly #'s Placement Log Sheet
- **Narrate under “Service Closure” Category in UWORKS, Subject: CTW-Obtained Employment**

### ❖ 8. Service Closure:

- Close Follow Up Choose To Work Service from Plan : **“Completed”** after 90 days minimum or 12 month maximum of employment
- Close Follow Up Choose To Work Service from Plan: **“Did Not Complete”** if client Lost or Quit job before 90 days
- **Narrate under “Service Closure” Category in UWORKS**
- Inactivate Case Management from Option Menu in UWORKS

# CTW Narrations from Referral to Service Closure

Referral → Case Staffing → Assessment → Employment Plan →

Progress Evaluation → Job Development → Obtained Employment → Follow Up

**1) Category:** Referral

**Subject:** CTW

**Note:** Referral received from Richard, VR Counselor.

**2) Category:** Case Staffing

**Subject:** CTW - VR/Client/CTW

**Note:** Case staffing held for Meredith Grey with Richard, VR Counselor, and me. Meredith would like to find work in medical billing and coding. She would like full time work and suffers from hearing loss. Added myself as **Primary/Secondary** Counselor, Activated Case Management and Employment Exchange. Set 30 day task to approve or decline referral

**3) Category:** Assessment

**Subject:** CTW Accepted Case

**Note:** Meredith attended her assessment with me yesterday. Meredith would like to find full time employment doing medical billing and coding but would like to focus on the coding. She would like to make at least \$14/hour. She recently finished her schooling from SLCC and got her national certifications on Oct. 20th. Meredith is willing to participate in at least 30 weekly hours of CTW activities. She will document this time on job logs and we will meet weekly to go over them and to get her some more referrals. She would like my help in generating job leads and job development. She does have a resume and at first glance it looks great but I will review it and make suggestions as needed. Meredith indicates that she does get nervous in interviews but feels like she does well. She has no problems with filling out employment applications. She has never been to any DWS workshops and at this time we see no need for them but may look at them in the future. She received training from VR services. Meredith has hearing loss. This does qualify her for CTW services.

Emailed to Richard, VR Counselor.

**4) Category:** Employment Plan

**Subject:** CTW Placement Strategy

Meredith Grey will be involved in at least 30 weekly hours of CTW activities. This will include at least 20 hours of job logs. It will also include weekly meetings with **CTW Specialist** and any other employment related activity.

Due to her disability, Meredith requires help in generating job leads and contacting employers. Job development needed will be determined as services progress.

Emailed to Richard, VR Counselor.

**5) Category:** Progress Evaluation

**Subject:** CTW Interviews/Referrals

**Note:** Meredith attended her appointment with me yesterday. She was offered a job in Bountiful as a medical coder. The job paid little and was far from home so she decided to turn it down. She does have a job interview today with Exodus Health Care. She will contact me after the interview to let me know how it went. Gave her 3 more referrals. We are scheduled to meet again next week.

Emailed to Richard, VR Counselor.

**6) Category: Job Development**

**Subject:** CTW Job Development

**Note:** Meredith did attend her appointment with me on Tuesday. She was turned down for the job at Exodus but has had a second interview with Seattle Grace Hospital. She will notify me of the results of the interview. She continues to work very hard with the CTW program and is getting some great interviews. I was able to find 2 more leads for that she really seemed interested in. We also got a job shadow with Dr. McDreamy at Seattle Grace Hospital who has several leads for her at this time. We are scheduled to meet again next week if the job with Seattle Grace does not come through.

Emailed to Richard, VR Counselor.

**7) Category: Service Closure**

**Subject:** CTW Obtained Employment/Follow Up

**Note:** Meredith phoned me today to inform me she has obtained employment with Seattle Grace Hospital as a medical biller. She will be doing medical billing for 40 hours per week. She will be making \$12/hour. Her supervisor is Chief Richard Webber. Closed CTW Expanded Service on her plan and added Follow Up Service. Added job to Work History Tab and Customer Misc. (Placement Screen) in UWORKS. I will contact her monthly and follow up with her case for 90 days to make sure employment is maintained.

Emailed to Richard, VR Counselor.

**8) Category: Progress Evaluation**

**Subject:** CTW Follow Up

**Note:** Meredith continues to maintain employment. No problems reported at this time and she seems to be enjoying her job. She will contact me immediately if any problems arise. I set a task to contact her next month to check on employment.

Emailed to Richard, VR Counselor.

**9) Category: Progress Evaluation**

**Subject:** CTW Follow Up/Benefits

**Note:** Meredith continues to maintain employment. She asked about help with getting medical benefits. We spoke with her employer about offering benefits after 6 months probation and he said this is an option and will review this with her next month, based on her performance. She will contact me if any problems arise. I set a task to contact her next month to check on employment.

**10) Category: Service Closure**

**Subject:** CTW Successful Closure

**Note:** Meredith continues to maintain employment. She has showed up on time, learned many new skills and was offered medical benefits due to her performance. She is stable in her job and no longer needs CTW Services. Closed Follow Up Service on plan Completed, Inactivated Case Management and let her know she can be referred again in the future if needed.

Emailed to Richard, VR Counselor.